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ABSTRACT

This paper develops further the ideas contained in two earlier reports, Effective Secondary Schools (1988) and Effective Primary Schools (1989), and recommends a systematic approach to the management of school effectiveness through using a school development plan. The purpose of the paper is twofold: to present and explain the role of the school development plan in managing school effectiveness; and to show how performance indicators which have been developed specifically for use in education can contribute to quality assurance and self-evaluation in schools. Quality assurance encompasses all aspects of school life; it includes ensuring the continuing effectiveness of established good practices as well as the smooth and systematic introduction of new ones. The school development plan is suggested as an important enabling mechanism, by means of which today's changes, such as the 5-14 development programme, or staff development and appraisal, can be introduced in a planned and sensitive manner, while yesterday's changes are considered and improved on and tomorrow's are recognized as having their place. The first chapter describes the school development plan and discusses its advantages. Chapter 2 highlights components of the plan's objectives section, and chapter 3 presents a framework for the audit section and audit process. Guidelines for the plan's development section--an outline of priority projects--are offered in the fourth chapter. The role of the head teacher in ensuring action is described in chapter 5, with attention to interaction with staff, parents, the school board, and community. Appendices contain sample outlines of school development plans, an example of a performance indicator, guidelines for school self-evaluation, and 10 selected sources for further reading. (LMI)

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Management of Educational Resources: 5

The Role of School Development Plans in Managing School Effectiveness

HM Inspectors of Schools
Scottish Office Education Department

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Management of Educational Resources: 5 The Role of School Development Plans in Managing School Effectiveness

HM Inspectors of Schools
SCOTTISH OFFICE EDUCATION DEPARTMENT

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Contents

	FOREWORD	Page v
	INTRODUCTION	vii
1.	THE SCHOOL DEVELOPMENT PLAN	1
2.	THE SCHOOL DEVELOPMENT PLAN: AIMS SECTION	3
3.	THE SCHOOL DEVELOPMENT PLAN: AUDIT SECTION	4
4.	THE SCHOOL DEVELOPMENT PLAN: DEVELOPMENT SECTION	7
5.	ENSURING ACTION	9
APPENDIX 1 :	EXAMPLES OF OUTLINE SCHOOL DEVELOPMENT PLANS	10
APPENDIX 2 :	EXAMPLE OF A PERFORMANCE INDICATOR	19
APPENDIX 3 :	ADVICE ON UNDERTAKING SCHOOL SELF-EVALUATION	22
APPENDIX 4 :	SELECTED FURTHER READING	24

Foreword

Throughout the United Kingdom and Europe, and elsewhere, school self-evaluation is being developed in various forms. In Scotland, although most developments are still in their early stages, some important progress has already been made. In a number of areas the Technical and Vocational Education Initiative (TVEI) has provided a useful impetus by focusing attention on the need for target setting and development planning. More recently, the Scottish Office Education Department (SOED) initiative on Management Training for Headteachers has encouraged a wider debate on school effectiveness. Good progress has also been noted by HM Inspectors in a number of primary and secondary schools throughout the country as a result of headteachers and staff taking initiatives of their own.

This paper has been produced, by a team drawn from the Management of Educational Resources Unit (MERU) of HM Inspectorate and other inspectors who have been closely involved with monitoring and evaluating the management and effectiveness of schools, to provide impetus for further development. It considers the contribution a school development plan can make to effective management by providing a focus for systematic evaluation of the key aspects of a school's work and for the management of its activities. The paper is not intended to be prescriptive, nor does it claim to be comprehensive; the intention is that it should contribute to the thinking of schools, education authorities and School Boards as they consider the issues involved in managing school effectiveness. The paper should be useful to everyone interested in the improvement of learning and teaching in schools.

T N GALLACHER
HM Senior Chief Inspector of Schools

Introduction

All those involved in or concerned with education should have an interest in its quality. Pupils, parents, teachers and the community at large are entitled to expect that the quality of education will be assured. The SOED, managing authorities and individual schools and teachers have complementary parts to play in quality assurance. Their role involves, in each case, both the creation of the necessary conditions for a high quality of education, the monitoring of performance against appropriate educational aims and the effective use of available resources. Within schools, teachers and headteachers have a responsibility to maintain and improve the quality of the education they offer and to give an account of their school's success in achieving its aims to appropriate interested parties, such as pupils, parents, School Boards and education authorities. The key to fulfilling these obligations lies in finding successful means of managing school effectiveness.

This paper develops further the ideas contained in Effective Secondary Schools and Effective Primary Schools and recommends a systematic approach to the management of school effectiveness through using a school development plan.

The purpose of the paper is twofold: to present and explain the role of the school development plan in managing school effectiveness; and to show how performance indicators which have been developed specifically for use in education can contribute to quality assurance and self-evaluation in schools. Quality assurance encompasses all aspects of school life; it includes ensuring the continuing effectiveness of established good practices as well as the smooth and systematic introduction of new ones.

The school development plan is suggested as an important enabling mechanism, by means of which today's changes, such as the 5-14 development programme, or staff development and appraisal, can be introduced in a planned and sensitive manner, while yesterday's changes are consolidated and improved on and tomorrow's are recognised as having their place.

CHAPTER ONE

The School Development Plan

What is a school development plan?

1.1 Quality assurance in a particular school depends on systematic professional evaluation of the achievement of clearly defined aims by the school's own staff led by the headteacher. A school development plan should help headteachers organise such school self-evaluation and plan a programme of activities aimed at sustaining and improving aspects of the school's work. It provides a means of organising relevant information about where the school is and where it is going, so that the information can be easily understood by specialist and non-specialist alike. Formulation of a school development plan should encourage and assist headteachers to take accurate and systematic stock of the school's current performance, to consider the most effective use of available finance and resources, to think and plan strategically for the phased introduction of new initiatives, to consolidate recent developments and to report on existing practice and performance.

1.2 At its simplest, a school development plan might comprise three sections:

i. an aims section;
ii. an audit section; and
iii. a development section.

The purpose and nature of these three sections are considered in detail in Chapters 2, 3 and 4. Appendix 1 contains examples of outline school development plans.

What are the advantages of a school development plan?

1.3 A school development plan should be very useful to a school in several ways, and can also contribute to effective local and national evaluation of educational provision.

1.4 Within the school there are the following advantages:

The Aims Section can:

i. allow a clear statement of the school's aims so that they are easily understood by staff, parents and pupils;
ii. provide a framework against which policies and priorities can be derived; and
iii. establish a reference point against which the school can evaluate the success of its activities.

The Audit Section can:

i. describe performance in relation to school aims, indicating particular strengths and weaknesses;
ii. form a sound basis for identifying areas which require to be consolidated or improved;
iii. provide a context for the planning of specific projects aimed at consolidating or improving the work of the school;
iv. provide a structure for reporting the school's performance to appropriate parties, such as parents, the School Board and the authority; and
v. be a means of giving publicity to the school's enterprise and achievements.

The Development Section can:

i. offer a rational means by which existing procedures for the ongoing management of the work of a school can be consolidated and improved;
ii. facilitate effective, well focused use of available finance and resources;
iii. provide a means of planning the implementation of major national or education authority developments, such as the 5-14 programme, staff development and appraisal, or a policy on, for example, supporting pupils with learning difficulties;
iv. set out a clear, realistic programme of priority projects for one to three years; and
v. suggest activities for teachers' planned activity time (PAT) and staff development days which are directly relevant to the improvement of the work of the school.

1.5 The existence of school development plans across an area would provide the responsible authority with a regularly updated overview of schools' perceptions of their own performance and development needs. Consideration of the audit sections in the school development plans could provide detailed information on patterns of performance in the area and provide useful starting points for external audit or evaluation. Consideration of all the development sections in the school development plans should identify curriculum and staff development needs across an area and make an important contribution to the responsible authority's policies in these areas.

1.6 The list of projects in each school development plan should be negotiated between the school and the responsible authority, so that it is recognised as the agreed statement of the school's forward commitment, in terms of both educational and financial goals, over the coming session. This recognition is important, as it creates responsibilities and benefits for both parties. The school would be committed to achieving the targets for the agreed priority areas identified in the audit section, while being assured that major additional projects would not be required of it by others during the session. The responsible authority would know what it might expect from the school and gain information useful in planning its allocation of finance and resources.

CHAPTER TWO

The School Development Plan: Aims Section

What does the Aims Section contain?

2.1 This section should contain a concise statement of the aims of the school. These should articulate the educational philosophy of the school and its community, taking account of available guidelines and the views of parents. School aims should be expressed in such a way that they are easily understood by teachers, parents, pupils and the wider community.

2.2 The aims provide broad statements which form the starting point for the construction of school policies which should outline the means by which the aims will be achieved. Policy statements provide a backcloth against which performance in the key areas of the school's work can be evaluated and priorities for development identified.

2.3 Any evaluation of a school's performance must be related to its stated aims. A direct link must be established between aims, policies, priorities and the targets contained in development projects. The success (or failure) of any particular project can only be evaluated in relation to whether or not it has contributed to the meeting of one or more of the school's stated aims.

CHAPTER THREE

The School Development Plan: Audit Section

What does the Audit Section contain?

3.1 This section should provide an evaluative summary of the school's performance in the key areas of its work, related to its stated aims and the available resources. **It should give a concise statement of the quality of education in the school, indicating particular strengths and weaknesses.**

3.2 Audit is an appropriate term to use because of its association with a recurring process of evaluation of the effectiveness of a system or organisation. It does, however, require to be interpreted in an educational context. It refers to the use of finance and resources and embraces both the more obviously quantifiable indicators of a school's performance such as examination results, staying-on rates or numbers of parents seeking to enrol their children, and the more qualitative aspects of a school's work.

3.3 **The principal activity in an educational audit, as envisaged in this paper, is the professional consideration of evidence of all kinds relating to: the quality of the curriculum; the quality of learning and teaching; pupils' progress and attainment; management of staff, finance and resources; and the ethos of the school including matters of discipline and counselling and relationships with pupils and parents.**

3.4 The following core set of key areas is suggested as the basic framework for the audit process.

Basic Framework for Audit (Key Areas)

Primary School

Class/Stage

i. Quality of the curriculum
ii. Quality of learning and teaching
iii. Pupil progress and attainment

Whole School

Management of -

i. Staff
ii. Curriculum planning
iii. Available finance and resources
iv. Accommodation
v. Ethos (including relationships with pupils, parents and teachers, and discipline and counselling)

Secondary School

Department

i. Quality of courses
ii. Quality of learning and teaching
iii. Pupil progress and attainment
iv. Management of -
- Staff
- Curriculum planning
- Accommodation and resources
- Ethos

Whole School

Management of -

i. Staff
ii. Curriculum planning
iii. Available finance and resources
iv. Accommodation
v. Guidance
vi. Ethos (including relationships with pupils, parents and teachers, and discipline)

Note This framework would also be applicable in special schools.

The Audit Process

3.5 Schools should carry out an annual audit of all the key areas as part of the ongoing management of the school. The level of detail of the audit will have to be well judged to ensure that useful management information is produced without creating an unnecessarily complex or time-consuming exercise. Schools may wish to carry out the audit of different key areas at different levels of detail from one year to another, according to local circumstances and priorities. **The overall aim, however, should be to ensure that the school can make annually a concise evaluative statement of its performance in each of the key areas of its work.**

3.6 The audit is concerned with the professional evaluation of the work of the school as a whole by its own management and staff. It is not directly concerned with the appraisal of individual teachers, but a school's arrangements for identifying staff development needs and for appraisal would be part of the provision to be evaluated under "Management of Staff". In practice, this will mean evaluation of how the school meets the requirement for an annual review of staff development and for individual appraisal contained in the National Guidelines on Staff Development and Appraisal in Schools issued in January 1991. Clearly, the processes of school audit and appraisal of individual performance are complementary: the audit of key areas of the work of the school will to some extent reveal the quality of teachers' work and assist in the identification of staff development needs.

3.7 Audit of the school's work in each key area will require an agreed understanding among staff about the content of each area and about what constitutes good performance in relation to it. **HM Inspectors are developing sets of performance indicators for use in school self-evaluation which relate directly to the framework for audit outlined above. These indicators will be made available as part of a training pack in session 1991-92. The indicators will offer a more detailed analysis of each key area and give illustrations of different levels of performance, so that schools can use them as touchstones against which to assess their performance.** They may also be useful as models for schools to use or adapt in designing performance indicators of their own. The introduction of such indicators can stimulate much productive staff discussion about aspects of a school's performance. **Appendix 2** contains some information on the indicators which have been developed.

3.8 Using performance indicators can help staff to systematise their evaluation of complex activities which require qualitative judgement rather than straightforward measurement. By analysing all the evaluative responses of departments or groups of teachers the headteacher can construct an overall view of the school's performance which can then be recorded succinctly to form the audit section of the school development plan. A concluding paragraph in the audit section should record decisions made by the school regarding which key areas of the school's work are to be the focus of attention in a development project and which are to be subject to ongoing monitoring. The number of areas identified by an audit as needing improvement or monitoring may be greater than the school can realistically deal with. Decisions on priorities may be necessary in drawing up the development section.

CHAPTER FOUR

The School Development Plan: Development Section

What does the Development Section contain?

4.1 This section should contain a detailed outline of a manageable number of agreed priority projects for the session ahead. The number would vary according to the circumstances of the school, but would probably not exceed six.

Some projects would arise from audit of the ongoing work of the school including, for example, the management of staff available, finance and resources. Others would be included as a result of national and local priorities and might involve all teachers or all departments in a school. One project, for example, might be to implement an aspect of the 5-14 development programme. Others would be included as a result of the school's own audit process, for example, to improve the quality of primary-secondary links. In these cases the need for each particular project should be evident from a reading of the audit section of the school development plan. As an aid to longer term planning it would be useful for the development section to contain a list of the priority projects likely to be undertaken in the next two or three years; this list would be reviewed and updated yearly. **Appendix 1** shows examples of outline school development plans and of particular projects arising from audit of a school's work.

4.2 **Each project should be outlined in terms of:**

i. **Targets, including criteria for success**
Both targets and criteria should be specific and easily understandable; they might be based on an agreed set of performance indicators.

ii. **Implementation strategies for achieving the targets**
Clear statements are needed of the remits of all those involved and of the action to be taken.

iii. **Timescale**
A realistic timescale is essential. For many projects, one year will be a reasonable time. Some projects, like the implementation of major programmes such as the 5-14 development,

Standard grade, and appraisal procedures may spread over a number of years. Nevertheless, targets should be set in a way that allows annual evaluation of progress.

iv. **Resource and staff development requirements**
The main requirements before and during the project should be made explicit, including any advice and support needed from outwith the school, and in relation to available staff, finance and resources.

v. **Evaluation procedures**
Clear procedures should be specified for collecting and evaluating evidence of success or lack of success in reaching the targets.

4.3 While a project is being undertaken, the main management responsibility is to support and evaluate the activities as they take place. Evaluation should involve senior management in regular consultation with those involved in the project to establish:

i. whether the project continues to be well directed towards the agreed targets;
ii. how interim findings or likely final outcomes relate to the stated criteria for success;
iii. what rate of progress is being made;
iv. the quality of teamwork and of the contribution being made to the project by each participant;
v. whether the remit of each participant continues to be relevant;
vi. whether the allocations of staff time, finance and material resources continue to be appropriate; and
vii. whether effective use is being made of advice and support from outwith the school.

As a result of such evaluation during a project, some alterations may have to be made. Major alterations should be documented clearly and concisely.

4.4 When projects are successfully completed their outcomes will contribute to an improvement in the overall quality of education provided by the school. It is, however, important to include in each annual audit of the school's work specific evaluation of the effects of development projects and to take account of them in planning for the next session. The result might be continuation or modification of a project intended to extend over more than one year; another project to achieve further improvement in an aspect of the school already addressed; or a new project in a new area of concern identified by the overall school audit process.

4.5 In each succeeding year, the audit section of the school development plan will contain both an account of the school's evaluation of all the key areas in the framework for audit (see section 3.4) and an account of the evaluation of the progress achieved in each development project undertaken in the previous year. The development section will contain the school's priority projects arising from its audit and other projects arising from education authority and national initiatives.

CHAPTER FIVE

Ensuring Action

5.1 A school development plan is of no real benefit unless it helps to bring about effective action to assure and improve the quality of education provided by the school. It is the clear responsibility of the headteacher to explain to staff and parents the role of the school development plan in managing school effectiveness.

5.2 The best way to establish a positive climate for this may be to produce a trial school development plan, involving all staff in the process. Being consulted, having one's opinions seriously considered, feeling that one's contributions are valued and that they may result in change for the better are all powerful builders of morale, confidence and commitment. It is important that a climate is created and maintained which ensures that staff think and work as a team and that they are committed to the school's aims, audit and development activities. The headteacher should develop among all staff a climate of discussion and constructive analysis of the work of the school. Submission of the senior promoted staff's own management activities to such analysis can be an important factor in bringing about the right climate for school self-evaluation (see **Appendix 3**).

5.3 It is important that school development plans should be concise and easy to understand. The input of School Board members as non-specialist readers of development plans may have much to offer in this respect. Moreover, early involvement of the School Board in the production of the school development plan would allow the school to benefit from the views of parents and the wider community.

5.4 Local authorities have an important role to play in assuring and improving the quality of learning and teaching in schools. Some already have plans for introducing quality assurance schemes which emphasise the importance of school development plans in managing school effectiveness. The school development plan offers a school and the responsible authority a practicable means of evaluating the work of the school and of managing new initiatives. It provides an opportunity for schools and authorities to work together to establish a more systematic approach to the management of school effectiveness in Scotland. It is an opportunity that should not be missed.

APPENDIX ONE

Examples of Outline School Development Plans

The amount and complexity of the work involved in school development planning will vary considerably between, for example, small primary schools, large secondary schools and special schools. The underlying structure of the school development plan however remains the same. The key features of the plan may be summarised as follows:

i. the School Development Plan as a whole
The school development plan should be a concise document of approximately eight to ten pages in length. Its purpose is to help schools achieve an overview and to suggest a strategy which will allow them better to cope with current concerns and priorities. It should bring together an evaluation of the current position in each of the key areas of the school's work and an outline of the projects proposed for the coming year. **The production of the document should not become an onerous and time-consuming task; the process of implementing the plan is of much greater importance than the writing of a lengthy and complex document.**

ii. the Aims Section
this should be a concise statement to enable readers of the plan to relate projects to the stated aims of the school.

iii. the Audit Section
The basic framework of the audit section should be that given in Chapter 3. It would include evaluative statements of performance for each of the key areas of the school's work. The use of evaluative statements drawn from a system of performance indicators may be helpful.

iv. the Development Section
A suggested maximum number of six priority projects should be included in the development section. Each project should be planned and described according to the pattern in section 4.2.

An outline of two school development plans is given below, one for a primary and one for a secondary school. They are intended to illustrate a possible format and to exemplify certain elements in the audit and development sections.

Aims Section [1 page]

Statement of school aims

(eg) 'To provide learning experiences and activities which develop pupils' individual talents and abilities to the full and equip them with the knowledge and skills required to meet future challenges.'

Audit Section [2-3 pages]

1. Statement of school's performance in each of the key areas of its work -
   - i. Quality of the curriculum at each class/stage
   - ii. Quality of learning and teaching at each class/stage
     (eg) 'Audit of the work of each class suggests that throughout the school too much emphasis is placed on didactic teaching methods. Pupils spend insufficient time in situations where problem-solving and independent thinking are encouraged.'
   - iii. Pupils' progress and attainment at each class/stage
   - iv. Management of
     Staff, including staff development and appraisal
     Curriculum planning
     Available finance and resources
     Accommodation
   - v. Ethos, including relationships with parents, pupils and the community; discipline and counselling

2. Summary of priorities identified as a result of the audit. (Notes - In the second and subsequent years, a statement of the outcomes of each development project measured against the stated criteria for success would be included in the audit section. An additional 1-2 pages may be necessary).

Development Section [5-7 pages]

(list of projects followed by an outline of each project and brief summary of future projects)

- (eg)

Project 1 : To implement the national guidelines on 5-14 language and mathematics.

Project 2 : To make the necessary preparations for implementation of the national guidelines on staff development and appraisal in accordance with regional proposals.

Project 3 : To implement the first 2 stages of the regional policy on learning support.

Project 4 : To improve the balance in teaching approaches throughout the school.

Future Projects: Implementation of 5-14 development programme (continued).
Implementation of national guidelines on staff development and appraisal (continued).
Review of resources, P4-7.

Example of Outline of Project 4 -

Project 4 : To improve the balance in teaching approaches throughout the school.

Target

"To change the balance in teaching approaches throughout the school in order to increase opportunities for pupils to be engaged in active learning, including group/individual activities; problem-solving situations; and other activities which encourage independent thinking, group discussion and decision-making."

The criteria for success are -

i. every teacher has introduced 2 major projects to their class work which have a significant emphasis on active learning and problem solving.
ii. every pupil has undertaken an individual project, appropriate to the class/stage, which requires independent thinking.
iii. group discussion and decision making are features of learning and teaching throughout the school.

Implementation strategies

i. discussion of active learning approaches during PAT and INSET days, including input from advisers/staff tutors.
ii. attendance at college INSET courses for appropriate staff (and report back).
iii. introduction of agreed techniques and applications into teachers' project plans and classroom practice.

Timescale

1 school year

Resources and staff development requirements

people

i. AHT in the lead
ii. whole staff
iii. EA advisers and staff tutors

time

i. 4 x 1 hour PAT sessions

ii. 1 x 1/2 day INSET sessions

iii. 2 staff on 2 days' INSET course

materials

i. paper/reprographics materials for production of project materials

cost

i. cost of 2 x 2 days' college in-service course (course fees, travel expenses, supply teachers)

ii. cost of materials

iii. EA costs

(NB: these costs should be quantified)

Evaluation procedures

HT and AHT to evaluate progress using a set of performance indicators relating to quality of learning and teaching, including the performance indicator 'Involvement of Pupils in Learning' (see Appendix 2), by -

i. discussion with individual teachers

ii. classroom observation

iii. discussion with pupils

iv. examination of teachers' plans and records of work

v. discussion among whole staff at PAT session

Aims Section [1 page]
Statement of schools aims
(eg) 'To provide a curriculum which is appropriate to the needs and aspirations of all our pupils.'

Audit Section [3-4 pages]

1. Statement of school's performance in each of the key areas of its work -
   i. Quality of courses
      (eg) 'Recent developments in the S3/S4 curriculum, including the introduction of Standard Grade, SEB short courses, SCOTVEC modular courses and TVEI, have led to a situation which is in need of urgent review.'
   ii. Quality of learning and teaching
   iii. Pupil progress and attainment
   iv. Management, at departmental and whole school levels, of -
      Staff, including staff development and appraisal
      Curriculum planning
      Available finance and resources
      Accommodation
   v. Ethos, including relationships with parents, pupils and the community; discipline and guidance

2. Summary of priorities identified as a result of the audit.
   (Notes: In the second and subsequent years, a statement of the outcomes of each development project measured against the stated criteria for success would be included in the audit section. An additional 1-2 pages may be necessary.)

Development Section [5-7 pages]
(list of projects followed by an outline of each project and brief summary of future projects)

- (eg)

Project 1 : To make the necessary preparations for implementation of the national guidelines on staff development and appraisal in accordance with regional proposals.

Project 2 : To review and strengthen primary school links as part of the implementation of the 5-14 development programme.

Project 3 : To review current arrangements for first-line guidance within the school.

Project 4 : To introduce and develop the SCAMP administration system.

Project 5 : To review the S3/S4 curriculum in the light of regional and national policies and recommendations, taking account of the particular circumstances of the school and the needs of its pupils.

Future Projects : Implementation of national guidelines on staff development and appraisal (continued).
Implementation of the 5-14 development programme (continued).
Review S5/6 curriculum.

Example Outline of Project 5

Project 5 : To review the S3/S4 curriculum structure in the light of regional and national policies and recommendations, taking account of the particular circumstances of the school and the needs of its pupils.

Targets

"To -

i. conduct an in-depth review of the S3/S4 curriculum structure and make recommendations for change;

ii. create a curriculum structure which caters for the personal, academic and vocational needs and aspirations of all pupils, having regard to priorities, costs, resources and staffing;

iii. make the necessary changes in the school timetable and option sheets to accommodate the new curriculum structure; and

iv. ensure that the revised arrangements are clearly understood by pupils, staff, parents and School Board members.'

The criteria for success are -

i. a series of recommendations on which to base decisions is produced;

ii. a curriculum structure catering for the personal, academic and vocational needs and aspirations of all pupils, and which is acceptable to staff, pupils and parents, is introduced;

iii. changes in the school timetable and option sheets facilitate the implementation of the revised curriculum structure; and

iv. pupils, parents, teachers and School Board members fully understand the revised arrangements.

Implementation strategies

i. a series of working groups, under the leadership of faculty heads, each to review the curriculum as it applies to the faculty and make recommendations for change;

ii. HT to provide working groups with guidance re general issues, possible changes, costs, etc;

iii. working groups' recommendations to be consolidated into one document by DHT, and a list of recommendations to be produced;

iv. Senior promoted staff, in consultation with department heads, to agree recommendations.

v. DHT to design the new curriculum structure, incorporating the agreed recommendations, and to draw up appropriate course option sheets and timetables to facilitate implementation of the new structure;

vi. information/guidance to be made available to staff, pupils, School Board members and parents.

Timescale

i. review and dissemination of information to be completed in time for recommendations to be incorporated into the following year's timetable/curriculum structure; (specified date)

ii. recommended changes to be implemented at start of following school year.

Resources and staff development requirements (people, time, materials, costs)

school

i. 6 x 1 hour PAT sessions for members of working groups;

ii. 2 x 1/2 day INSET sessions for whole staff;

iii. time for senior promoted staff to investigate general issues eg costs;

iv. materials/costs relating to documentation;
(NB: costs should be quantified)

regional authority

i. 2 x1/2 day INSET input by up to 6 advisers/staff tutors.

Evaluation procedures

Evaluation of changes against a set of performance indicators relating to quality of the curriculum structure. Evidence to be gathered by Senior Promoted Staff by -

i. review of revised documentation on the curriculum;

ii. discussion with teachers, pupils, SB members and parents re their perceptions of the changes in the curriculum;

iii. evaluation at the end of following year and in subsequent years of the impact of the changes to the curriculum, for which procedures would have to be developed.

APPENDIX TWO

Example of a Performance Indicator

What is a performance indicator?

Performance indicators are being developed by HM Inspectors of Schools for each of the key areas of audit referred to in Chapter 3. They provide illustrations of levels of performance against which a school can evaluate its performance in relation to its aims. Performance indicators are concerned with outcomes rather than intentions.

How can performance indicators be used?

In the context of an audit the levels of performance illustrated in the performance indicators can be used as bench marks against which current performance can be evaluated. By using a set of performance indicators which cover the basic framework for audit (see section 3.4), a school will be able to identify its strengths and weaknesses across all the key aspects of its work, and hence provide the information necessary for the audit section of the school development plan. Further information on performance indicators and on how they might be used will be made available as outlined in **Appendix 3**.

What are the main features of a performance indicator?

An example of a performance indicator is shown on page 21. Reading from top to bottom -

The headings indicate that this performance indicator is concerned with performance in the key area of 'Learning and Teaching' in primary class/stage. In particular, it is about the involvement of pupils in learning.

The first of the larger boxes gives details of the particular themes which are important when considering the involvement of pupils in learning. In this case there are three themes, which is about the maximum number considered appropriate if the performance indicator is to be both valid and manageable.

The remaining two boxes contain illustrations of performance at different levels. Four levels of performance have been identified by HM Inspectors as follows:

major strengths - a very good performance

strengths outweigh any weaknesses - some improvement desirable

strengths are outweighed by weaknesses - significant improvement needed

major weaknesses - an unsatisfactory performance.

In the example which follows, the illustrations are provided for 'major strengths' and 'strengths outweighed by weaknesses'. Illustrations could be written by head-teachers and staff for the other levels if considered necessary in individual schools. Schools may also wish to design some performance indicators of their own to meet particular needs.

Performance indicators provide the opportunity for all those involved in evaluation of performance to agree the criteria on which performance is judged and thus introduce a degree of consensus about quality. They can provide a basis for evaluating the school's performance and for identifying its development needs, including those of the staff.

Primary	Class	Ref No PC 2.2
Learning and Teaching		Quality of Pupils' Learning

This performance indicator is concerned with the following themes:

the extent to which-

- pupils are motivated by the learning experience;
- pupils have opportunities to take responsibility for, and be active in, their own learning and are encouraged to undertake independent thinking; and
- pupils are encouraged to co-operate with others.

Level	Illustration
Major Strengths	• A learning environment which encourages pupils to produce work of high quality has been established. Praise is regularly used to motivate pupils. Pupils work well and enthusiastically without close supervision. • The planned framework for learning includes opportunities for pupils to take responsibility for, and be active in, their own learning. Pupils are frequently required to think for themselves and reflect on ideas, issues and experiences. • Pupils are encouraged to work collaboratively in a variety of circumstances involving groups of different composition and size.

A performance broadly equivalent to that illustrated above would be considered as having major strengths - a very good performance.

Strengths outweighed by weaknesses	• Pupils respond conscientiously to the tasks set by the teacher, but the work of the class is characterised by a lack of enthusiasm and pupils have few opportunities to exercise initiative. Some steps are taken to encourage good work and improve motivation but these are not maintained. • Pupils have few opportunities to take responsibility for, or be active in, their own learning and do not always work well in the absence of direct supervision. They do what the teacher asks them to do but in many cases they are passive listeners or watchers or undertake tasks which do not require much thought. • Pupils have few opportunities to work collaboratively or have opportunities which lack variety in terms of composition and size of groups.

A performance broadly equivalent to that illustrated above would be considered as one in which strengths are outweighed by weaknesses - significant improvements are needed.

APPENDIX THREE

Advice on Undertaking School Self-Evaluation

Advice on undertaking school self-evaluation.

Considerable advice already exists in HM Inspectors' reports *Effective Secondary Schools* and *Effective Primary Schools*. More detailed advice and support is contained in the module *Monitoring School Effectiveness*, which is part of the national programme of Management Training for Headteachers. In due course, a series of supportive publications will be available. These are outlined in the following paragraphs.

HM Inspectors have been developing performance indicators to help primary and secondary schools undertake audits of key areas in which evaluation is based to a large extent on professional judgement. An example of such a performance indicator was given in **Appendix 2** and the key areas for which indicators have been devised are shown in section 3.4 of the paper. A package of materials, including the indicators and advice on their application is being prepared, in conjunction with regional authorities, for publication later in 1991. Guidance will be given on such matters as the selection of appropriate performance indicators for evaluating particular aspects of a school's work; how schools might devise their own performance indicators for particular issues; how evidence might be gathered on which to make judgements; and how the match between evidence and performance indicators might be discussed in various groupings of school staff.

HM Inspectors have also devised, in collaboration with the Scottish Examination Board (SEB) and the Scottish Vocational Educational Council (SCOTVEC), a new approach to evaluating a school's performance in Scottish Certificate of Education (SCE) examinations and National Certificate modules. Guidance for schools on the use of this approach is being prepared for publication later in 1991; the publication will draw on recent initiatives in two or three regional authorities. Further consideration is being given to the evaluation of areas of a school's work which can be quantified, including staying-on rates, timetabling and finance.

The Self-Evaluating School Research Project being undertaken by Northern College of Education on behalf of SOED has already produced a number of reports on various self-evaluation schemes and initiatives, which have been circu-

lated to education authorities. The project is now in its second stage, involving practical work in schools. Guidance based on the actual experience of schools undertaking self-evaluation will be published in 1992.

Researchers from Craigie, Jordanhill and Moray House Colleges of Education are working with a sample of schools to provide guidance on how the views of parents, pupils and teachers can be taken into account in school self-evaluation. This guidance will be made available to regional authorities during session 1991-92.

HM Inspectors plan to work with schools and authorities in following up the introduction of school development plans. In a year or so when some experience in the use of the plans has been gained consideration will be given to publishing further advice and some examples of good practice.

APPENDIX FOUR

Selected further reading

1. Effective Secondary Schools. SOED. HMSO. 1988.

2. Effective Primary Schools. SOED. HMSO. 1989.

3. Measuring Up: Performance Indicators in Further Education. SOED. HMSO. 1990.

4. Curriculum. Staffing and Timetabling. SOED. HMSO. 1990.

5. National Guidelines for Staff Development and Appraisal in Schools. SOED. HMSO. 1991.

6. What Makes a Good School (Talking About Schools). SOED. HMSO 1990.

7. The Self-Evaluating School Research Project. Northern College of Education. 1990.

Briefing Papers:

i. School Self-Evaluation - Historical Context
ii. LEA Initiated School Self-Evaluation Schemes
iii. GRIDS (Guidelines for Review and Internal Development)
iv. International Projects and Initiatives

8. Management Training for Headteachers. SOED. 1990.

Module: Monitoring School Effectiveness (available through education authorities).
Module: Principles of Management (available through education authorities).

9. School Matters: The Junior Years. P.Mortimore et al. Open Books. 1988.

10. Planning For School Development. DES. 1989

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